

Maybelline Leads; Upscalers Cite Revlon

Cosmetics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Maybelline	70%	72%	59%
Revlon	54	43	98
Cover Girl	36	35	43
Max Factor	31	31	31
Aziza	10	8	16
L'Oreal	9	9	9
Coty	8	8	9
Clairol	7	8	2
Prince Matchabelli	6	5	11
Hazel Bishop	4	5	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Maybelline	79%	69%	82%	58%
Revlon	33	52	24	98
Cover Girl	37	33	44	51
Max Factor	19	19	25	32
Aziza	4	8	7	10

Source: DSN/Leo J. Shapiro & Associates

Maybelline is the cosmetics brand mentioned most often as a top brand by discount store managers as a whole.

But, those at upscale chains named Revlon most often.

Maybelline was cited by 70% of all store managers polled and by slightly more (72%) of managers at conventional discount chains. Of those polled at upscale chains, however, 98% named Revlon and 59% named Maybelline.

Cover Girl and Max Factor held firmly to the No. 3 and No. 4 positions and Aziza came in a distant No. 5.

Interestingly, Clairol, a hair care products and personal care appliances company which also owns Sea Breeze skin care products, was also cited often enough to make our top 10 cosmetics brand list as No. 7. Technically, however, the name is not a cosmetics brand.

Overall, few store managers saw an increase in the number of brands their stores stocked in cosmetics departments.

In the South, North Central and West, 3% of the managers in each area reported increases in cosmetics brands. In the Northeast, only 1% of the managers felt there had been an increase.

Strengths Examined

Regional strengths in the top five brands were also revealed by the survey. For example, Maybelline is stronger in the South and North Central regions of the country. In each of those regions, 74% of the managers polled named Maybelline as a top-seller. In each of the other two regions—the Northeast and the West—63% identified Maybelline.

Revlon, the No. 2 brand overall, was mentioned most often in the West, with 65% naming the brand. In that region, Revlon was named more often than Maybelline—which was cited by 65% of those polled.

Cover Girl was strongest in the North Central region with 44% of the managers polled identifying the brand. Although Cover Girl was named by 36% of managers from all discount stores, in

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THE NAKED SALESMAN.

It comes in a state of nature, so to cover itself, our ready-to-assemble and finish furniture sells paint and stain, brushes and thinner, steel wool and sandpaper. Sells 'em by the cart-load. And the line itself sells by the carload—good-looking solid pine, precision grooved and pre-drilled for easy assembly into furniture that people are proud to own. Three lines, with a variety of styles, items and price points, all programmed and packaged to give you maximum profit. Master Pieces, Fine Line and Encore—they sell the pants off everything else in the category. Marketing Division, Consumer Products, P.O. Box 8220, Stockton, CA 95208. 209/946-5800.

AMERICAN FOREST PRODUCTS COMPANY

Growth Regions

Northeast: 1%
South: 3%
North Central: 3%
West: 3%

In cosmetics, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the West, South and North Central States—3%.

Source: DSN/Leo J. Shapiro & Associates

Cosmetics

(Continued from page 22)

the West that figure dropped to 18%.

The largest variation in popularity showed up in the regional break out for Max Factor. The No. 4 brand landed mentions by 31% of the managers overall. In the North Central region that number dropped to a low of 17% and in the West that number rose to a high of 55%.

Adding It Up

In the Northeast, 37% named Max Factor and in the South 25% thought of the brand as a top-seller.

Another strong regional difference was illustrated for Prince Matchabelli. Overall, the brand ranked No. 9, with 6% of the managers mentioning the name. In the Northeast, however, only 1% said Matchabelli; 3% in the South; 6% in the North Central area, and a whopping 14% in the West.

On a chain-by-chain break-out, Maybelline held its No. 1 position except at Target, where Revlon was the leader with 98% of the store managers mentioning it. At that chain Maybelline was named by 58%.

Maybelline's highest number of citations came at Zayre, where 82% of the managers consider the brand a top-seller. At K mart, 79% of the managers named the brand and at Wal-Mart 69% of those polled named Maybelline.

Cover Girl was identified most strongly at Target, where just over half, 51%, of the managers called the brand a top-seller. The lowest number of mentions for Cover Girl came at Wal-Mart with 33% of the managers naming the label.

Both Max Factor and Aziza had their strongest results from Target. Max Factor was named by 32% of the Target managers, as opposed to 25% of the Zayre buyers and 19% of both the K mart and Wal-Mart buyers. Aziza was called a top brand by 10% of the Target buyers, 8% of the Wal-Mart managers, 7% of the Zayre managers and 4% of the K mart managers.

Distribution Parley Planned by NMRI

NEW YORK — The National Mass Retailing Institute will hold its first Physical Distribution and Transportation Conference, Jan. 9-11, 1985, at the Fairmont Hotel in New Orleans.

Among the topics on the agenda are "Motivation of the Work Force," "Distribution as a Competitive Weapon," "Paperless Distribution Centers," "Trip Leasing" and "Warehouse Automation."

A study on physical distribution and transportation conducted by Arthur Andersen & Co. for the NMRI will be presented.

Cosmetics

Top Brands' Performance by Region

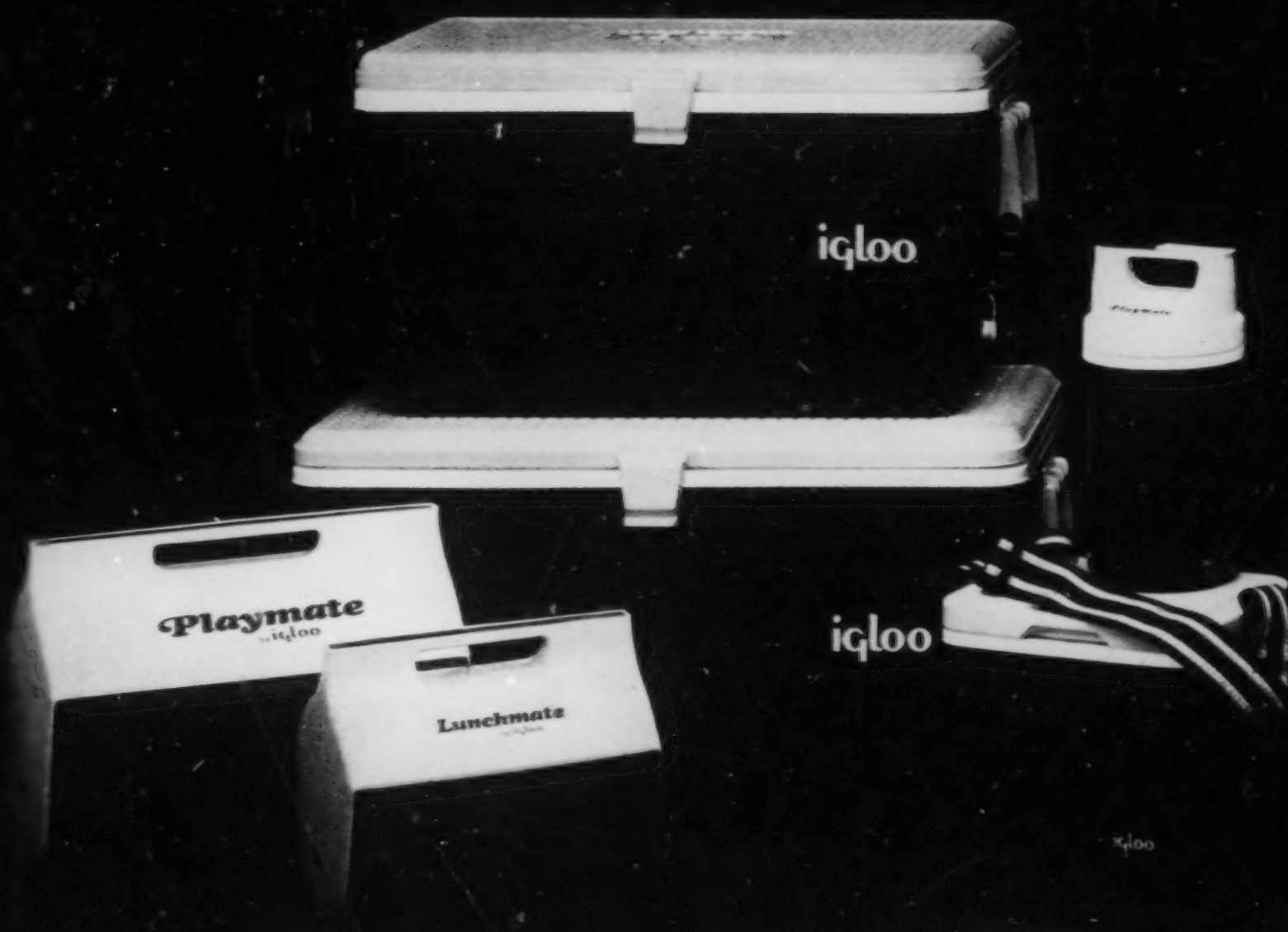
Brands	Northeast	South	North Central	West
Maybelline	63%	74%	74%	63%
Revlon	46	47	58	65
Cover Girl	37	41	44	18
Max Factor	37	25	17	55
Aziza	6	11	12	7
L'Oreal	5	7	10	14
Coty	13	3	6	14
Clairol	3	6	10	6
Prince Matchabelli	1	3	6	14
Hazel Bishop	7	5	5	—

Source: DSN/Leo J. Shapiro & Associates



In cosmetics, few store managers have seen growth in brands carried this year. At K mart, which is revamping stores like this one in Rochester, Mich., the most managers—6%—cited growth. (DSN photo)

Now, Igloo gives you two good



Igloo. For customers who want the very best.

Until now, no ice chest manufacturer has been able to offer a wide range of price points.

So you were forced to use multiple suppliers.

Now Igloo offers you both the finest ice chest line in America and a brand new value line.

More people buy Igloo brand ice chests.

The reason your customers prefer Igloo products is simple.

They love them.

In fact, Igloo owners are so loyal that they don't buy just one Igloo product. They own an average of nearly four.

Actually, that isn't too surprising when you look into it.

Probably no other ice chest has as much built into it as an Igloo ice chest.

The outside is made of a tough plastic that has withstood attacks by hungry bears.

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Even the polyurethane foam insulation is superior at keeping drinks cold longer.

Igloo's new 5-year warranty.

Igloo products are built for keeps.

That's why we've extended our warranty to five years. (No other major brand has as long a warranty.) And it's good on all our Playmate®, Legend Series™, and Tag-Along™ ice chests and beverage coolers.

We've made some other improvements, too.

Like new, comfort-grip handles.

More durable latches.

And snazzy new designer colors.

A new value line: Explorer by Igloo.

Our new value line of ice chests

Traditional Leaders Remain in Forefront

Housewares

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Rubbermaid	47%	48%	44%
Corning	18	21	6
General Electric	14	10	34
Corelle	11	11	11
Ekco	10	10	9
Procter & Gamble	9	8	11
Anchor Hocking	8	7	9
Wear-Ever	6	6	8
Pyrex	6	7	2
Revere	6	6	3

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Rubbermaid	15%	46%	63%	41%
Corning	4	30	5	4
General Electric	1	11	7	35
Corelle	4	17	8	13
Ekco	5	5	3	2

Source: DSN/Leo J. Shapiro & Associates

The latest addition of brands in housewares hasn't affected the standings of the top traditional brands, according to store managers polled by DSN.

Rubbermaid, Corning, General Electric, Corelle and Ekco are the housewares brands most often cited by store managers at full-line discount chains.

Rubbermaid was named by 47% of all those polled. The No. 2 through No. 5 brands scored mentions from 18% to 10%.

These top five brands head an increasing roster of national brands in the department, store managers said. Housewares was cited by 22% of store managers as a department where name brand penetration had increases this year.

That figure was matched only in ladies' apparel and health and beauty aids. Men's apparel scored a close 21%, but no other department approached these levels of growth in brands carried.

The trend to add brands continues to spread among discounters, however, who seek new resources to raise housewares' margins, create distinctive assortments and add more fashion-oriented merchandise to their expanding mixes.

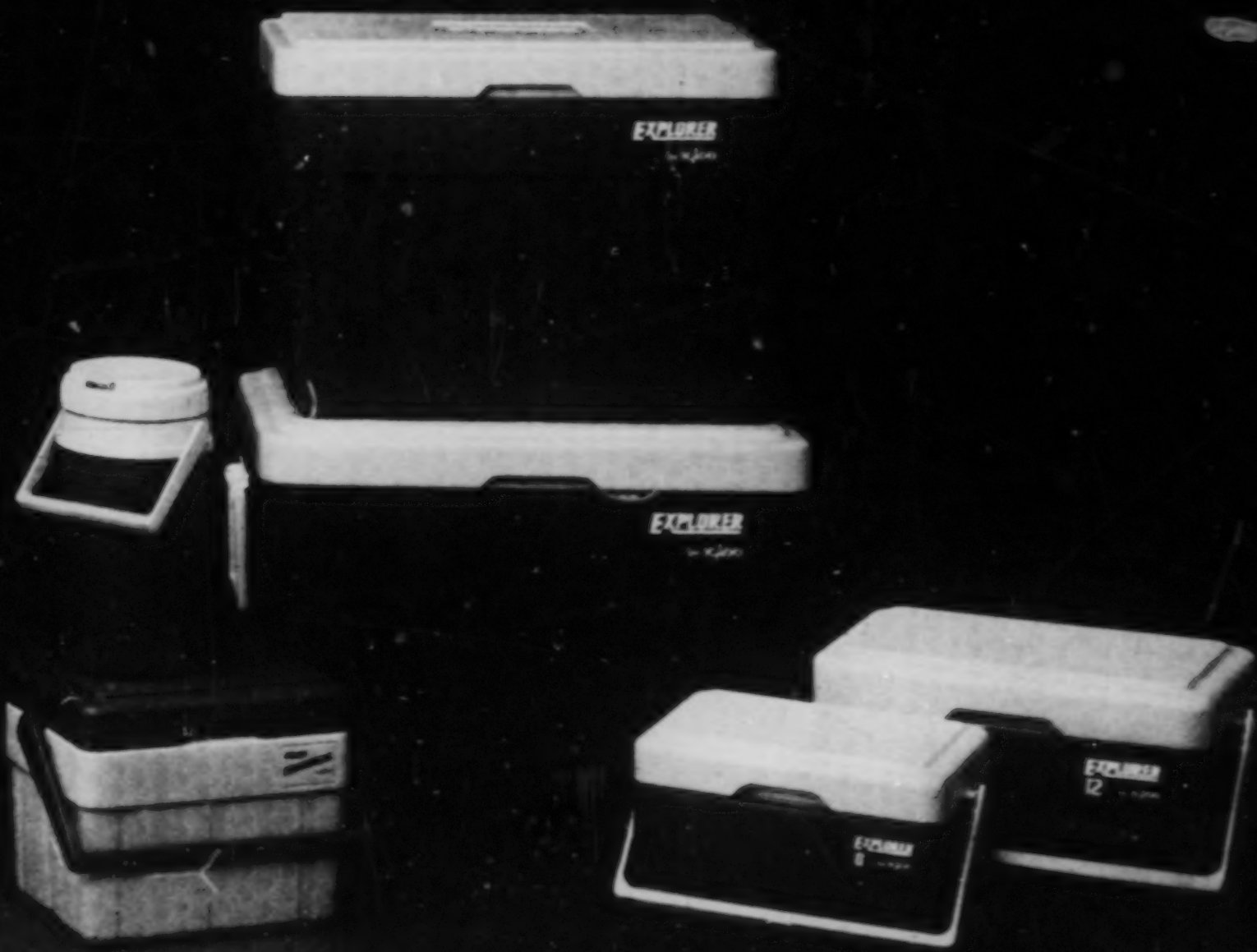
These goals made it predictable that managers at conventional chains, following the lead of upscalers, reported increases in housewares brand representation equivalent to those of upscale chain managers. At conventional chains, 22% mentioned housewares, compared to 21% of managers at the upscalers.

On a regional basis, full-liners in the Northeast cited the greatest increase in brands carried, 26%. Discounters in the North Central states followed at 23%; the South and West tied at still significant 20% levels of mention.

Among top brands listed, Corning earned the second spot among "all" discounters. Clearly, that was on the strength of conventional managers' 21% rating, since upscalers cited the brand just 6% of the time.

Two other brands made by
(Continued on page 26)

reasons to have one supplier.



And now, Explorer by Igloo. For customers who want value.

and coolers has a lot going for it. First, Explorer products are very economical to buy. So lots of people will want them.

But don't let the price fool you. They're not built cheaply. They're like any Igloo product—built for keeps.

And each one comes with a full 3-year warranty.

But that's not all. As you can see, the Explorer line comes in all kinds of popular sizes and shapes. And in two very exciting color combinations.

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igloo

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Growth Regions

Northeast: 26%
South: 20%
North Central: 23%
West: 20%

In housewares, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the Northeast States—26%.

Source: DSN/Leo J. Shapiro & Associates

HOUSEWARES/TOP BRANDS

Housewares

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Rubbermaid	50%	46%	45%	49%
Corning	15	18	4	42
General Electric	11	15	16	13
Corelle	12	11	12	8
Ekco	1	10	11	14
Procter & Gamble	4	8	9	14
Anchor Hocking	7	6	12	3
Wear-Ever	—	2	6	20
Pyrex	6	6	—	14
Revere	5	1	1	20

Source: DSN/Leo J. Shapiro & Associates



Rubbermaid, the leading housewares brand among discounters polled, was named a top seller by nearly two Zayre managers in three. Zayre, Framingham, Mass., endcaps Rubbermaid Servin' Savers.

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(L.S.A.P.) weighs less than an ounce. But despite its size, the engineering that went into it was no small feat.

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In addition, your customers won't have to thread the film, advance the film, focus, set the exposure. Or even rewind the film. It's all done automatically.

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that no other autofocus camera will ever have.

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Nikon
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Housewares

(Continued from page 25)

Corning—Corelle and Pyrex—earned the No. 4 and No. 9 “all” discounter listings. Corelle received equal levels of mention among conventional and upscale store managers, while Pyrex, like Corning, scored much more strongly among conventional store managers.

The No. 3 housewares brand, General Electric, will be phased out in housewares no later than 1987 because of the purchase by Black & Decker. Its current strength as a top brand is reflected in the survey, however.

Different Perspective

Upscale discounters cited G.E. as a best-seller 34% of the time—behind Rubbermaid only in their assessment. Managers at conventional chains named G.E. just one time in 10, tying it for fourth place in their judgment with Ekco, the No. 5 housewares brand overall.

Anchor Hocking, the sole glassware brand in the top 10 with an 8% level of mention, is close behind No. 6 Procter & Gamble. Two cookware suppliers, Wear-Ever and Revere, round out the top 10, each with mentions by 6%.

Mentions of the top five brands varied widely by chain, with Corning, Corelle and Ekco achieving their highest ratings at Wal-Mart. Corning, for instance, was cited as a best seller 30% of the time by Wal-Mart store managers, compared with 4% and 5% levels elsewhere.

Rubbermaid was cited most often by Zayre store managers—an unmatched 63% of the time. G.E. scored its best at Target, 35%. Notably, K mart ratings of the five leading housewares brands were consistently low, except for Ekco.

GE and Conair Get the Most Mentions

No single brand clearly dominates personal care, said discount store managers surveyed, who named General Electric and Conair most often.

Clairol, named by 32% of discounters overall as a top brand to earn the No. 3 slot, was equally popular among conventional store managers, 31%, and upscaleers, 34%.

Such consistent support by managers in both classes of trade was not evident, however, among the rest of the top five brands—including General Electric, Conair, Norelco and Vidal Sassoon. The survey showed differences in personal care brands favored by conventional and upscale discount store managers.

View Differs

For instance, General Electric, the No. 1 brand overall, was named by 52% of conventional store managers compared with 30% of upscaleers. Conair, No. 2, was cited by 49% of conventional full-liners and 27% of upscaleers.

General Electric's 48% overall level of mentions, and Conair's 45%, roughly doubled the popularity level of Norelco, the fourth top brand which was cited by 23% of discounters overall.

Vidal Sassoon, the fifth most often cited brand in personal care, was popular among 15% of store managers polled.

Healthy double digit top brand citations were achieved by many brands in the category, including No. 6 Sunbeam and No. 7 Gillette. These high levels of mention underscore the brand proliferation in personal care, which helps keep top brand honors a matter of hot contention.

Rounding out the top 10 brands are Remington, Windmere and Proctor-Silex, according to the survey. These brands, along with Sunbeam and Gillette, were consistently popular among both conventional and upscale discount store managers. Each of these brands had levels of mention which varied by less than eight percentage points between managers at different format stores.

Discrepancies among the top five appear by chain as

Growth Regions

North Central: 1%

In personal care appliances, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the North Central States—1%.

Source: DSN/Leo J. Shapiro & Associates

Personal Care Appliances				
Top Brands Vary by Type of Outlet				How Industry's Top 5 Fare at Chains
Brands	All Discounters	Conventional Discounters	Upscale Discounters	
General Electric	48%	52%	30%	
Conair	45	49	27	
Clairol	32	31	34	
Norelco	23	15	55	
Vidal Sassoon	15	10	36	
Sunbeam	11	9	18	
Gillette	10	10	13	
Remington	5	5	2	
Windmere	4	5	—	
Proctor-Silex	4	4	1	
Source: DSN/Leo J. Shapiro & Associates				
Brands	K mart	Wal-Mart	Zayre	Target
General Electric	45%	65%	21%	29%
Conair	87	51	51	18
Clairol	34	24	16	37
Norelco	1	24	3	55
Vidal Sassoon	1	11	—	31
Source: DSN/Leo J. Shapiro & Associates				



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Since then, over 300 improvements later, our invention has been the standard of the television industry. It's gone around the world and into outer space. It's even won an Emmy.

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Winners Span Variety of Subcategories

Top brands in automotive span a broad variety of subcategories, underscoring the department's balanced sales strength.

Despite oil brands' strong presence on the list of best sellers—copping the No. 1 and No. 2 spots—brands of chemicals, replacement parts, batteries and waxes were also cited frequently as leading brands by store managers polled.

Quaker State, the brand cited 55% of the time by discount store managers, and Pennzoil, named by 32%, provide a solid one-two sales punch for the department, the survey revealed.

A third oil brand, Valvoline, appears as the seventh top brand on a 16% level of mentions. A fourth, Havoline, is the 10th leading brand at 10%.

STP, listed by 25% of all full-line discounters, edged out Prestone as the leading chemical brand and the department's third best seller overall. Prestone, cited 23% of the time by store managers, is the No. 4 brand overall.

Replacement engine parts brand Champion nailed down the No. 5 spot, edging Fram's level of mentions by one percentage point, 19% vs. 18%.

AC-Delco was the leading battery brand; at 13%, it was mentioned eighth most frequently by store managers. Turtle Wax, named by 10%, was the only body care item cited often enough to appear on the list.

Significantly, the top five brands represent three diverse product segments: oil, chemicals and replacement parts.

Also important, support of the five leading brands was consistent among store managers at conventional and upscale chains. Quaker State, for instance, was cited as a top brand by 54% of conventional full-liners and 59% of upscalers. Similar balanced results appear for Pennzoil, STP, Prestone and Champion.

On the other hand, Fram and Turle Wax fared much better among conventional discounters, while Valvoline and AC-Delco were mentioned far more frequently as best sellers by upscale store

(Continued on page 32)

Automotive

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Quaker State	55%	54%	59%
Pennzoil	32	33	28
STP	25	26	19
Prestone	23	23	24
Champion	19	18	23
Fram	18	22	2
Valvoline	16	14	24
AC-Delco	13	7	39
Turtle Wax	10	12	2
Havoline	10	10	8

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Quaker State	37%	57%	90%	53%
Pennzoil	38	25	3	30
STP	10	40	18	11
Prestone	12	22	53	19
Champion	18	11	14	22

Source: DSN/Leo J. Shapiro & Associates

ANCO.

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Tests prove it.

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For more information, contact your ANCO supplier. You'll discover that ANCO is the best blade you can sell.

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Growth Regions

Northeast: 4%
South: 5%
North Central: 1%
West: 6%

In automotive, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the West—6%.

Source: DSN/Leo J. Shapiro & Associates

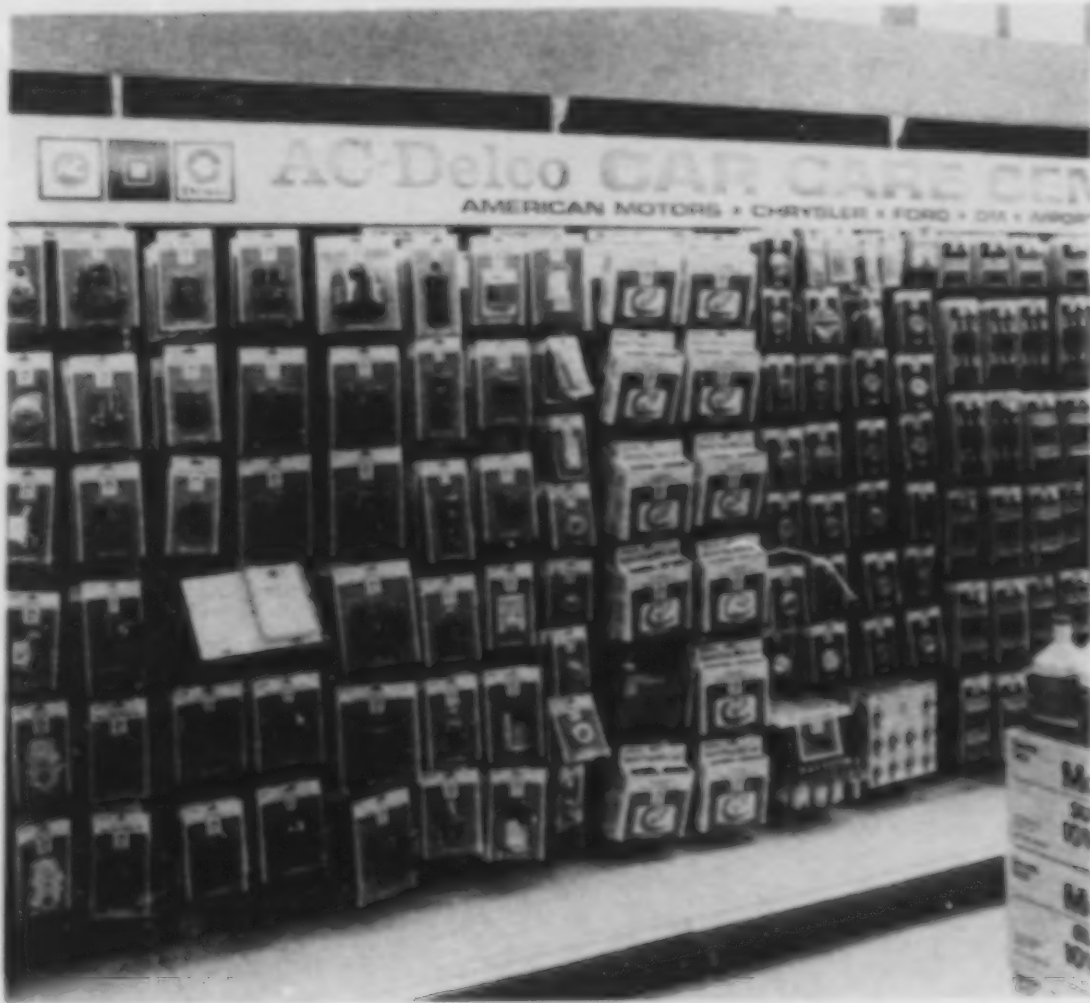
AUTOMOTIVE/TOP BRANDS

Automotive

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Quaker State	72%	60%	57%	29%
Pennzoil	25	15	40	55
STP	18	31	20	30
Prestone	22	20	21	34
Champion	16	15	16	31
Fram	15	20	6	37
Valvoline	20	15	14	15
AC-Delco	5	14	22	7
Turtle Wax	15	6	5	20
Havoline	6	23	4	2

Source: DSN/Leo J. Shapiro & Associates



AC-Delco, the only battery brand on the top 10 listing, fared nearly six times better among upscale store managers, who named it as their No. 2 brand. Bradlees, Watertown, Mass., gives the brand its own display. (DSN photo)

Automotive

(Continued from page 31)

managers. When store managers at four leading full-liners were asked to name their five top-selling brands, Quaker State headed the list at three. An impressive 90% of Zayre managers cited Quaker State as a top brand, as did 57% at Wal-Mart and 53% at Target.

At K mart, Pennzoil nosed out Quaker State by one percentage point, 38% vs. 37%, as the chain's most often named automotive brand, according to store managers polled.

While receiving similarly strong 30% levels of mention at Target and 25% at Wal-Mart, Pennzoil's citations slipped to 3% among Zayre store managers.

Wal-Mart managers' 40% level of mentions provided the impetus for STP's appearance on the top brand list. That frequency of identification as a best seller far exceeded mentions by 18% at Zayre, 11% at Target and 10% at K mart.

Similarly, Prestone's number of citations as a top brand were high only at one chain—Zayre—whose managers cited the brand more than half the time. In comparison, only 19% of Target store managers, 22% at Wal-Mart and 12% at K mart cited Prestone as a leading automotive brand.

Adding It Up

Discount store managers mentions of Champion as a top brand, though less frequent, were more consistent. Target store managers identified Champion most often, 22%, compared with 18% at K mart, 14% at Zayre and 11% at Wal-Mart.

Discount store managers in all parts of the country cited an increase in the number of automotive brands carried during 1984. The greatest expansion apparently took place in the West, where 6% of store managers reported broadened brand assortments; 5% of managers in the South said the same, as did 4% in the Northeast and 1% in the North Central states.

The popularity of the top two automotive brands varied widely by region, said store managers polled. Quaker State, for instance, was identified as a top seller by 72% of discount store managers in the Northeast and just 29% in the West. Pennzoil attained a 55% level of mentions in the West and a weak 15% in the South.

Results were more consistent nationwide for STP, Prestone and Champion, the next leading brands, whose levels of mention ranged from 15% to 34% in different parts of the country.

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To get them into shape, stock Champion, the most accepted automotive—and non-automotive—spark plug brand. Contact your Champion representative today.

*Source: National Aftermarket Audit.



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Conventional, Upscale Mgrs. Split Vote

Thanks to overwhelming popularity among the upscale segment, Fisher-Price won the most mentions as a best-selling toy brand from full-line discount store managers.

But, Mattel scored a more consistent second place.

The No. 1 brand of educational and preschool toys was named by 56% of all discount store managers, but there was a stark difference between the conventional and upscale store managers.

Upscale store managers listed Fisher-Price 71% of the time. At conventional discount stores, however, managers named the brand 53% of the time, slightly less often than No. 2 Mattel, which was named by 55% of both conventional and upscale discount store managers.

Coleco exploded onto the list as the No. 3 toy brand and did not experience a serious split between the two discounting segments. No doubt, Cabbage Patch hysteria accounted for a 46% mention at conventional discounters and a slightly higher 48% share at upscale managers.

The remaining top five toy brands included No. 4, preschool toy brand Playskool, cited by 24% overall, and No. 5, Kenner, named by 22% at discounters.

For the most part, the number of branded items in toy departments appears to have reached its zenith with the recent influx of popular licensed goods in toy departments nationwide. Store managers in the South and North Central regions, however, anticipate minimal gains of 3% and 1%, respectively.

Growth Regions

South: 3%
North Central: 1%
In toys, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the South—3%.

Source: DSN/Leo J. Shapiro & Associates

Toys				
Top Brands Vary by Type of Outlet				
Brands	All Discounters	Conventional Discounters	Upscale Discounters	
Fisher Price	56%	53%	71%	
Mattel	55	55	55	
Coleco	46	46	48	
Playskool	24	27	11	
Kenner	22	23	19	
Milton Bradley	20	19	26	
Tonka	17	16	20	
Parker Brothers	16	14	26	
Huffy	10	12	1	
Hasbro	10	10	10	

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains				
Brands	K mart	Wal-Mart	Zayre	Target
Fisher Price	43%	51%	66%	82%
Mattel	41	73	28	53
Coleco	42	30	47	52
Playskool	26	24	34	11
Kenner	36	8	6	11

Source: DSN/Leo J. Shapiro & Associates

On a regional basis, the two top brands saw little shifting. Both Fisher-Price and Mattel stayed within a 4% swing of the combined store manager poll in each regional breakout—except for Mattel in the Northeast. The brand was only mentioned by 48% of Northeastern store managers, a seemingly high response until compared to its 55%-59% range in the three remaining regions.

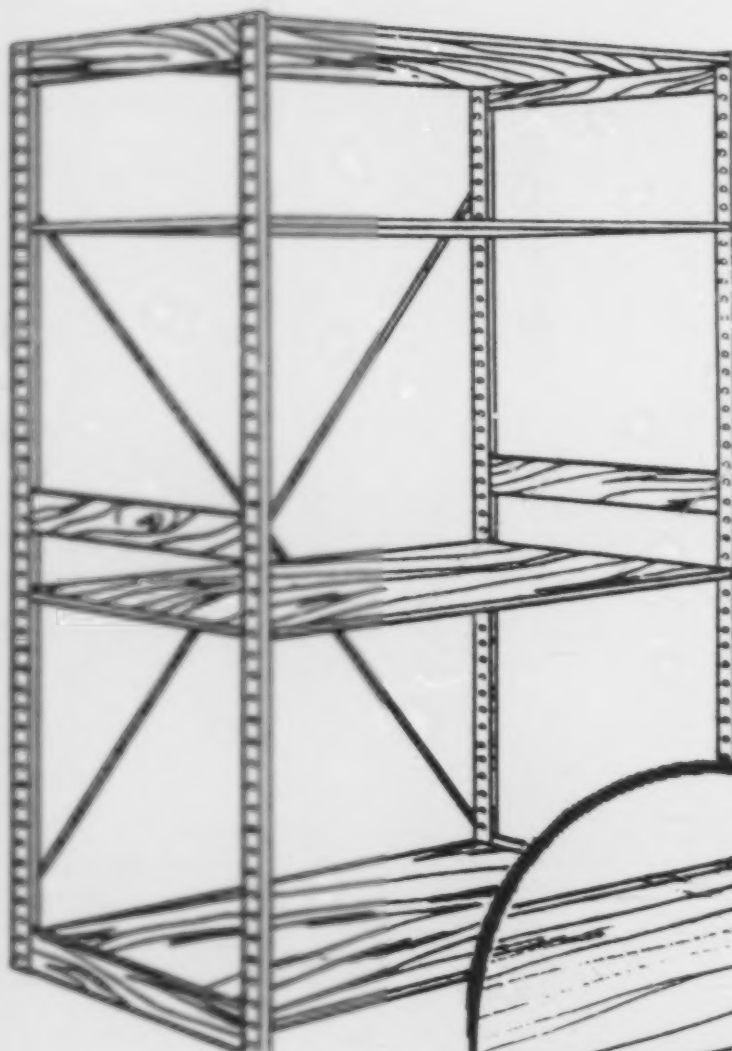
Coleco, however, fluctuated in popularity from region to region. Its strength was clearly seen in the West, where 64% of store managers cited the brand, compared with a smaller 38% who named it in the South. Managers in both the Northeast and North Central regions named Coleco 43% of the time.

Kenner, No. 5 on the list, experienced a wide range of regional responses. Strong in the North, the brand was named by 30% of store managers in the North Central region and 28% in the Northeast, but the brand's strength fell to mentions by 15% in the South and 16% in the West.

Among the other top toy brands, Milton Bradley, recently acquired by Hasbro, saw its greatest popularity in the Northeast region with a 27% mention by managers. In the three remaining re-

(Continued on page 40)

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TOYS/TOP BRANDS

Toys

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Fisher Price	55%	55%	58%	57%
Mattel	48	56	55	59
Coleco	43	38	43	64
Playskool	21	29	17	29
Kenner	28	15	30	16
Milton Bradley	27	17	19	20
Tonka	11	14	17	26
Parker Brothers	14	7	12	39
Huffy	17	10	8	7
Hasbro	10	11	10	9

Source: DSN/Leo J. Shapiro & Associates



Fisher-Price and Playskool are the preschool toy brands which copped two of the top six spots in the category's brands survey. Together, they dominate perimeter gondola display at Fedco, Cerritos, Calif.

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Toys

(Continued from page 39)

gions, mentions of the board game brand ranged from a 17% response in the South to a 20% share in the West.

In contrast, Parker Brothers, another of the leading board game names, was named 39% of the time in the West, 14% in the Northeast, 12% in the North Central and only 7% in the South.

Both board game brands were named by 26% of the upscale discounters, with Milton Bradley cited by 19% at the conventional discounters and Parker Brothers named by only 14% of store managers at conventional chains.

A chain-by-chain breakout illustrates many of the before-mentioned trends, particularly in the case of the leading brands.

For example, Fisher-Price was named by 82% of up-scaler Target's store managers, while its highest share among conventional discount chains was seen at Zayre, with 66% mentions, K mart managers named Fisher-Price 43% and Wal-Mart, 51%.

Strengths Examined

Playskool, a second preschool brand, saw its greatest popularity at the more conventional segment with a 27% mention, compared to an 11% rating from upscalers. Strongest at Zayre, where it was named by 34%, Playskool saw a 26% share at K mart and a 24% mention at Wal-Mart. At Target only 11% mentioned the brand, relying instead on the Fisher-Price line.

Mattel, which saw consistent mentions by 55% across the board in types of chains, had its strongest response from Wal-Mart, which named the brand 73% of the time. Target followed at 53%. Mattel's percentages dropped at K mart to 41% and to 28% at Zayre.

Coleco was named by 52% of Target store managers.

PHOTO/TOP BRANDS

Kodak and Polaroid Get Most Mentions

Photo

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Kodak	85%	87%	77%
Polaroid	50	52	40
Canon	37	32	62
Minolta	23	19	40
Pentax	16	13	28
Fuji	9	10	3
Nikon	6	1	26
Yashica	6	7	—
General Electric	3	2	5
Vivitar	3	3	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Kodak	84%	89%	97%	73%
Polaroid	33	58	77	46
Canon	56	34	—	60
Minolta	40	14	3	39
Pentax	32	3	—	17

Source: DSN/Leo J. Shapiro & Associates

Kodak is the undisputed No. 1 photo brand among discounters; Polaroid ranks second.

The leading brand of simple-to-use cameras and film was named by 85% of all full-line managers as a best seller, reflecting Kodak's balanced support among conventional store managers, who cited it 87% of the time, and upscalers 77%.

Polaroid, which was named as a top brand by exactly half the store managers polled, displayed greater popularity among conventional discounters who named the brand 52% of the time compared with 40% at upscalers.

Indeed, upscalers named No. 3 Canon as a top brand 62% of the time—the closest score of any to Kodak, and which far outstripped Polaroid's mentions at upscale chains.

Minolta, No. 4 overall, tied Polaroid for the third highest mentions among upscalers at 40%. Like Canon and the No. 5 brand, Pentax, Minolta's mentions at upscale chains were about double its recognition among conventional store managers.

Further down the list, Nikon showed a significant split in strength with mentions by 26% at upscalers and just 1% by conventional store managers.

Upscale discounters apparently lean more on costlier, more complex Japanese brands to help drive department sales. Three of the top five photo brands are Japanese—as are seven of the top 10. Virtually all of them were identified as top brands far less frequently by conventional discounters, the survey revealed.

Conventional store managers most often named Kodak as their leading brand and Polaroid No. 2.

Kodak and Polaroid each received their highest levels of mention by Zayre store managers, 97% and 77%, respectively. This became evident when managers at four leading full-liners were asked to name their best-selling photo brands.

Both brands also ran one-two at Wal-Mart, with respective 89% and 58% identifications. At K mart, Polaroid, named by 33%, was outdistanced by Canon, 56%;

(Continued on page 45)

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Growth Regions

South:	3%
North Central:	2%
West:	3%

In photo, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the West and South States—3%.

Source: DSN/Leo J. Shapiro & Associates



High-ticket Japanese cameras were far more popular among upscalers than conventional store managers, who called them top brands just half as often. All named Kodak the most. Shown is Fedco, Cerritos, Calif. (DSN photo)

Photo

(Continued from page 42)
Minolta, 40%, and barely eked out a fourth place over Pentax, named by 32%.
At Target, Polaroid at 46% was mentioned third most often behind Kodak, 73%, and Canon, 60%.
On a regional basis, Kodak and Polaroid raced to a one-two finish in all parts of the country except the North Central states, where the No. 2 position was usurped by Canon.
Kodak's regional mentions ranged from 77% in the Northeast to 91% in the South, the survey revealed. Polaroid was cited by 60% of discount store managers in the South down to 40% in the North Central region, where Canon's 47% mentions earned it second place.

A Closer Look

Indeed, Canon was a solid third in the Northeast, South and West regions, while Minolta and Pentax shared the No. 4 and No. 5 spots in different parts of the country, the survey showed.
Regional popularity of the top three photo brands matches the national pattern, with their best-selling mentions far surpassing those of brands ranking below, the survey revealed.
However, the strength of brands No. 6 through No. 10 in various regions is also evident. For instance, No. 6 Fuji was named by 11% of Northeast store managers, close to Minolta's 13% and Pentax's 15% levels. In the North Central region, Nikon's 10% mentions approached Pentax's 20%. In the West, Fuji was named a top brand by 17% of store managers, Yashica 15% and Vivitar 10%—not far behind citations of Minolta and Pentax.

Photo				
Top Brands' Performance by Region				
Brands	Northeast	South	North Central	West
Kodak	77%	91%	82%	86%
Polaroid	49	60	40	50
Canon	31	29	47	42
Minolta	13	15	34	27
Pentax	15	6	20	28
Fuji	11	6	5	17
Nikon	4	3	10	6
Yashica	—	4	5	15
General Electric	—	3	2	7
Vivitar	—	1	1	10

Source: DSN/Leo J. Shapiro & Associates

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CONSUMER ELECTRONICS/TOP BRANDS

Survey Finds No Runaway Top Brands

Consumer Electronics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Commodore	38%	39%	35%
Atari	32	33	28
General Electric	32	33	25
Panasonic	30	26	48
Soundesign	15	10	34
Emerson	15	17	6
Sanyo	13	11	24
RCA	11	13	5
Sony	8	9	1
Coleco	8	6	13

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Commodore	73%	—	44%	39%
Atari	45	5%	56	30
General Electric	37	47	14	28
Panasonic	16	56	5	54
Soundesign	8	16	—	40

Source: DSN/Leo J. Shapiro & Associates

There are no runaway top brands in consumer electronics, a department in which Commodore, the brand cited most often, was named by fewer than four discount store managers in 10.

The top eight brands in the category all received double digit percentages of mentions from store managers polled.

For the No. 1, No. 2 and No. 3 brands—Commodore, Atari and General Electric—top brand citations by store managers were consistent among conventional and upscale full-liners.

Commodore, mentioned by 38% of all store managers polled, was named by 39% at conventional stores and by 35% at upscale chains. Atari's 32% overall level of mentions resulted from one in three conventional store managers citing it as a top brand, and 28% at upscalers. General Electric showed a similar profile, 33% at conventional discounters and 25% among upscalers.

However, Panasonic, the No. 4 brand, was mentioned as a leading brand nearly twice as often by upscalers as conventional store managers, 48% of the time compared with 26%. Notably, that earned Panasonic the top rating among upscale store managers.

Soundesign, the fifth leading brand according to all discounters polled, was identified as a top brand by one upscale manager in three compared with just one in 10 among conventional store managers.

The flipflop patterns of top brand mentions by store managers continued through brands listed No. 6 through No. 10. For instance, Emerson, No. 6, was cited as a top brand nearly three times more often by conventional store managers than upscalers, 17% compared with 6%.

Sanyo and Coleco each fared twice as well among upscale store managers. RCA was named a top brand more than twice as often by conventional store managers, who also named Sony nine times more frequently than their upscale counterparts.

(Continued on page 50)

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Growth Regions

Northeast: 5%
South: 7%
North Central: 8%
West: 8%

In consumer electronics, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the West and North Central States—8%.

Source: DSN/Leo J. Shapiro & Associates

CONSUMER ELECTRONICS/TOP BRANDS

Consumer Electronics

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Commodore	35%	24%	51%	43%
Atari	27	24	28	56
General Electric	33	37	34	19
Panasonic	34	36	29	18
Soundesign	9	16	26	1
Emerson	17	23	12	4
Sanyo	11	10	10	26
RCA	18	13	3	15
Sony	9	9	5	8
Coleco	15	6	6	6

Source: DSN/Leo J. Shapiro & Associates



Computer-oriented brands, as shown at Gold Circle, Cincinnati, copped the top two survey standings overall in consumer electronics. (DSN photo)

CE

(Continued from page 46)

Notably, when store managers at four leading full-liners were asked to name their top brands, Wal-Mart responses countered the overall industry trend.

Wal-Mart managers did not name the No. 1 brand, Commodore, and just 5% named the No. 2 brand, Atari.

For its part, Commodore received its highest level of mentions from K mart managers, 73%, and somewhat fewer identifications by 44% of Zayre managers and 39% at Target.

Atari received its overall No. 2 standing on the strength of Zayre store managers, who named Atari as a top brand 56% of the time, compared with 45% at K mart and 30% at Target.

General Electric and Panasonic each was cited as a best seller most often by Wal-Mart store managers. General Electric, named by nearly one Wal-Mart manager in two as a best seller, was mentioned by just 14% of Zayre store managers, 28% at Target and 38% at K mart.

Disagreement

Panasonic was cited as a top brand by 56% of Wal-Mart managers and just 5% at Zayre, the survey showed. In addition, the brand's popularity at K mart whose managers named Panasonic 16% of the time—and Target, 54%, were also starkly different.

Soundesign's greatest number of top brand citations occurred among Target store managers, 40%, compared with none at Zayre, 8% at K mart and 16% at Wal-Mart.

On a regional basis, Commodore appeared to be most popular in the North Central States, where more than half the store managers polled cited it as a top brand. Its weakest area, at a 24% level of mentions, was the South, the survey revealed.

Atari experienced similar levels of mention in the West, where 56% of store managers considered it a leading seller, and the South, 24%.

However, store managers in the South were kind to General Electric and Panasonic brands, which made their strongest showings in that part of the country. There, the brands achieved the No. 1 and No. 2 standings on the strength of respective 37% and 36% levels of mention.

Soundesign's regional popularity also varied widely—from a 1% level of mentions in the West to 26% in the North Central States.

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Wide Swings in Popularity Mark Brands

Ladies' apparel brands are subject to perhaps the widest swings in popularity—by chain and by region—than brands in any other category, according to store managers surveyed.

Discounters' most often cited ladies' wear brand, Lee, for example, showed the largest variance between number of mentions at conventional vs. upscale chains than the top seller in any other category.

Lee was mentioned by a total of 38% of all discount store managers polled. However, there was a huge gap of 44 percentage points between the 29% of managers at conventional stores and the 73% of managers at upscale stores who labeled the brand a top seller.

On the breakout of four major chains, the number of Lee brand citations hit lows of 3% and 4% at Wal-Mart and K mart, respectively. At Zayre, the brand's strength zoomed upward to mentions by a full third of the managers. At Target, Lee was named most often—by 70% of those polled.

Even on a regional basis, Lee's strength fluctuated from 10% in the West to 52% in the North Central region—a spread of more than 40 percentage points.

Further Information

Like Lee, the second leading brand, Wrangler, got its highest number of mentions at upscale chains. In those stores 35% listed Wrangler, compared to 22% in conventional stores. On a regional basis Wrangler was consistent in three regions with 24% to 28% listing the brand. But in the Northeast, a much smaller 11% named Wrangler.

At the four chains the survey breaks out, Wrangler outpaced Lee half of the time. Managers at both K mart and Wal-Mart named Wrangler more often, while Lee stayed ahead at Zayre and Target.

Variances were also evident for the other three of the top five brands—Chic, Levi and Jordache. Chic was named by 20% of the conventional chain managers compared with 8% of the upscale store managers. Levi, a brand not available to dis-

(Continued on page 54)

Ladies' Apparel

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Lee	38%	29%	73%
Wrangler	24	22	35
Chic	18	20	8
Levi	17	9	51
Jordache	14	14	10
Gitano	13	10	24
Sasson	10	11	5
Calvin Klein	10	5	30
Playtex	8	8	5
Gloria Vanderbilt	6	8	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

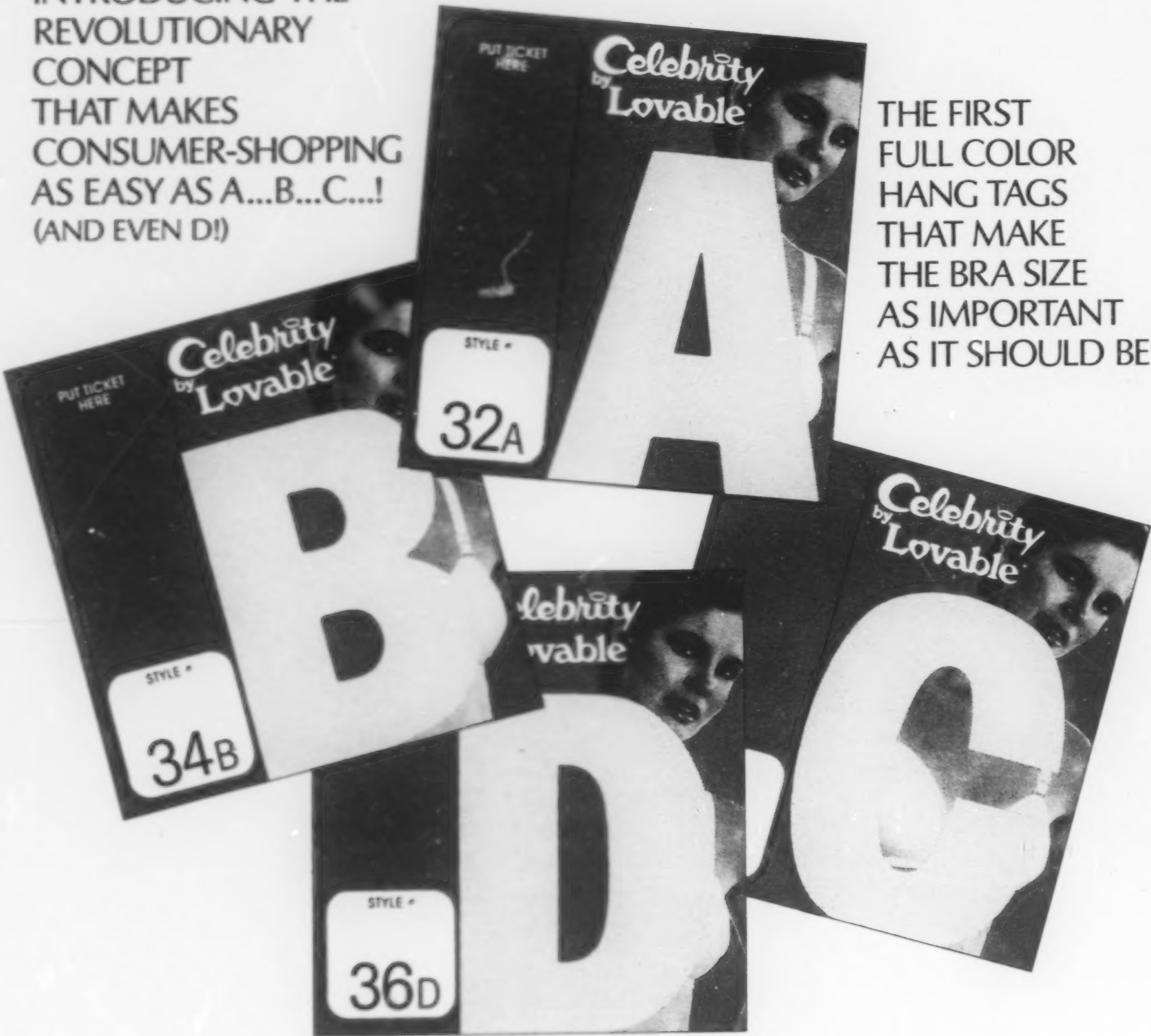
Brands	K mart	Wal-Mart	Zayre	Target
Lee	4%	3%	33%	70%
Wrangler	14	38	9	38
Chic	9	25	7	10
Levi	11	—	2	52
Jordache	30	8	3	12

Source: DSN/Leo J. Shapiro & Associates

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Growth Regions

Northeast: 18%
South: 25%
North Central: 27%
West: 15%

In ladies' apparel, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the North Central States—27%.

Source: DSN/Leo J. Shapiro & Associates

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LADIES' APPAREL/TOP BRANDS

Ladies' Apparel

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Lee	46%	37%	52%	10%
Wrangler	11	28	28	24
Chic	16	19	19	16
Levi	3	10	36	14
Jordache	10	10	24	7
Gitano	28	8	14	6
Sasson	16	10	13	1
Calvin Klein	3	13	17	—
Playtex	8	3	—	27
Gloria Vanderbilt	5	8	4	8

Source: DSN/Leo J. Shapiro & Associates



In ladies' wear, all of the five most often mentioned top-selling brands are jeans labels. At an opening this year, Bradlees, Watertown, Mass., used video to underscore its branded assortment.

Gad-about's™



Ladies'

(Continued from page 53)

counters directly, was named by 51% at upscale chains but only 9% at conventional chains. Notably, Levi was not named by any Wal-Mart manager.

From a regional vantage, Levi was strongest in the North Central area, with 36% naming the brand, and weakest at the Northeast discount chains.

Jordache appears the most consistent when upscalers, who named the label 10% of the time, are compared to conventional store managers, who cited it 14% of the time. But in the regional breakout the No. 5 brand received responses ranging from 7% in the West to over three times that—24%—in the North Central States. In both the Northeast and South the brand was mentioned by 10% of the managers polled.

A Closer Look

None of the top five brands looks the least bit consistent when comparing the four specific chains. Even Jordache is named sporadically.

Clearly, there are enough apparel brands—especially labels with roots in the jeans business—to support continued variances in most ladies' wear brands' strength. In fact, all five top brands and 9 out of the top 10 are labels originally associated with jeans only. (No. 9 Playtex is the exception.)

What's more, the number of brands stocked in discounters' ladies' wear departments continues to rise, say store managers. When asked which departments are stocking more brands this year, 22% of all managers polled named ladies' wear.

Three Jeans Makers Cited Most Often

Men's apparel brands are headed by three jeans names—Wrangler, Lee and Levi's.

In overall performance, Wrangler and Lee are running almost neck and neck, according to store managers, with mentions by 48% and 42% of those polled, respectively. Levi's, named as a top-selling brand in men's wear by 23%, came in a distant third.

Filling out the top five are Fruit of the Loom and McGregor, representing underwear and sportswear for men.

All of the top four brands were named more often by store managers at upscale chains than by those at conventional discount chains. For instance, Wrangler's popularity jumped from 41% at conventional stores to 77% among managers at upscale chains.

Lee, named by 33% at conventional chains, was listed as a top seller by a huge 79% at upscale chains. Likewise, Levi's was named by 17% at conventional chains but by almost half—47%—of those polled at upscale chains.

Even Fruit of the Loom, a

Men's Apparel				
Top Brands Vary by Type of Outlet				
Brands	All Discounters	Conventional Discounters	Upscale Discounters	
Wrangler	48%	41%	77%	
Lee	41	33	79	
Levi	23	17	47	
Fruit of the Loom	20	17	31	
McGregor	12	12	12	
Dickies	12	14	—	
Hanes	8	6	17	
Ocean Pacific	8	6	16	
Jordache	6	7	—	
Garan	6	7	1	
Source: DSN/Leo J. Shapiro & Associates				
How Industry's Top 5 Fare at Chains				
Brands	K mart	Wal-Mart	Zayre	Target
Wrangler	38%	84%	14%	75%
Lee	9	—	39	78
Levi	11	14	7	47
Fruit of the Loom	10	27	30	32
McGregor	3	—	31	14
Source: DSN/Leo J. Shapiro & Associates				

basic underwear label, won more mentions from managers at upscale chains—31%—compared with 17% at conventional discount stores.

McGregor was the only one of the top five brands that received the same percentage of citations across the board—12%.

Among the rest of the top 10 brands, Hanes and Ocean Pacific both were strongest at upscale chains. Ocean Pacific is a brand not available to discount chains through direct supply channels. Dickies and Jordache, named by less than 1% of the managers at upscale chains, as well as Garan were mentioned most

often among those at conventional full-line discounters.

Although jeans names clearly dominate in the category, 21% of all those store managers polled report the number of brands stocked in their departments have increased this year.

When responses from
(Continued on page 57)

Growth Regions	
Northeast:	10%
South:	18%
West:	20%
North Central:	30%
In men's apparel, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the North Central States—30%.	

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Men's Apparel

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Wrangler	32%	43%	64%	46%
Lee	55	37	56	17
Levi	11	22	27	28
Fruit of the Loom	24	20	20	14
McGregor	23	14	11	1
Dickies	24	17	5	1
Hanes	7	8	15	1
Ocean Pacific	—	1	6	27
Jordache	—	5	15	—
Garan	15	8	2	—

Source: DSN/Leo J. Shapiro & Associates



Overall, 21% of the store managers polled tagged men's wear an area where the number of brands carried has gained. At K mart, a full third of the managers have seen more men's wear brands this year. (DSN photo)

Men's

(Continued from page 56)

chains are broken out, K mart managers most often cited an influx of men's wear brands. A full third of the managers polled at that chain named the category as

one with a growing number of labels. Of course, this year K mart launched an upgrade that landed a wider assortment in many of its departments.

At Target, 27% of the store managers polled reported an increase in the men's wear brands their stores carry. At Zayre it was

10% and at Wal-Mart, 6%.

A look at how specific brands fared at those four chains underscores Wrangler's leadership as a discount store brand. The label was named by over three-quarters of those polled at Wal-Mart and Target. At K mart, 38% said Wrangler; at Zayre, only 14% named

the brand.

Lee, however, wasn't even mentioned by 1% at Wal-Mart despite its overall No. 2 standing. At K mart the label was mentioned by 9%. In contrast, 78% of the Target managers and 39% of those at Zayre named the brand.

Again, Fruit of the Loom received the most consistent

number of citations, although significantly fewer from those at K mart.

McGregor seems most well-entrenched at Zayre, where 31% named the brand. That sportswear label was not named by nearly as many at K mart and Wal-Mart, with 3% and less than 1%, respectively.

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CHILDREN'S APPAREL/TOP BRANDS

Strength of Brands Runs Relatively Low

Brand strength runs relatively low in children's apparel, according to DSN's top brand survey.

The most often cited brand—Garanimals—was mentioned by just a fifth of all the store managers polled, the lowest response rate for a top brand in any category.

In fact, when asked to name the top selling brands in children's wear, a full third—34%—of the managers did not name one.

Even with citations by 20% of all managers, Garanimals is clearly ahead of the other four top labels, which were all at the same level in overall mentions.

Garan, the No. 2 brand (made by the same company as color-coordinated Garanimals) won mentions from only 12% of the managers polled. Lee (No. 3) and Curity (No. 4) both were also named by 12%. The No. 5 brand in children's wear, Wrangler, was cited by 11%.

Pampers, with 10% of the mentions, was a strong No. 6. Health-Tex, a brand not sold directly to discounters at last reports, made the list as No. 7 with 9% of the over-

Children's Apparel				
Top Brands Vary by Type of Outlet				
Brands	All Discounters	Conventional Discounters	Upscale Discounters	
Garanimals	20%	21%	18%	
Garan	12	13	6	
Lee	12	9	21	
Curity	12	11	15	
Wrangler	11	8	22	
Pampers	10	6	26	
Healthtex	9	7	17	
Spencer	7	7	8	
Levi	5	2	17	
Gerber	4	5	3	

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Garanimals	—	46%	3%	9%
Garan	—	29	—	4
Lee	—	—	16	24
Curity	11%	—	9	9
Wrangler	4	11	—	22

Source: DSN/Leo J. Shapiro & Associates

all citations.

Among conventional chains, the list is close to the overall results with three exceptions: Curity overtook Lee with 13% vs. 9%; Pampers slipped to 6% under Health-Tex's and Spencer's 7%, and Gerber outranked Levi with 5% vs. 2%.

Among upscale chains, however, there are many more variances from the overall discounter list. Managers at those chains, for instance, named Pampers most often, followed by Wrangler and Lee. No. 1 Garanimals came in fourth among upscale chains only, and was closely followed by Health-Tex and Levi—both with 17% to the top brand's 18%.

Brands not among the top 10 overall that fared well at the upscale chains include: Huggies, named by 20% of the managers; Dr. Denton, named by 11%, and Gitano,

(Continued on page 60)

Growth Regions

Northeast: 1%

South: 6%

North Central: 6%

West: 7%

In children's apparel, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the West—7%.

Source: DSN/Leo J. Shapiro & Associates

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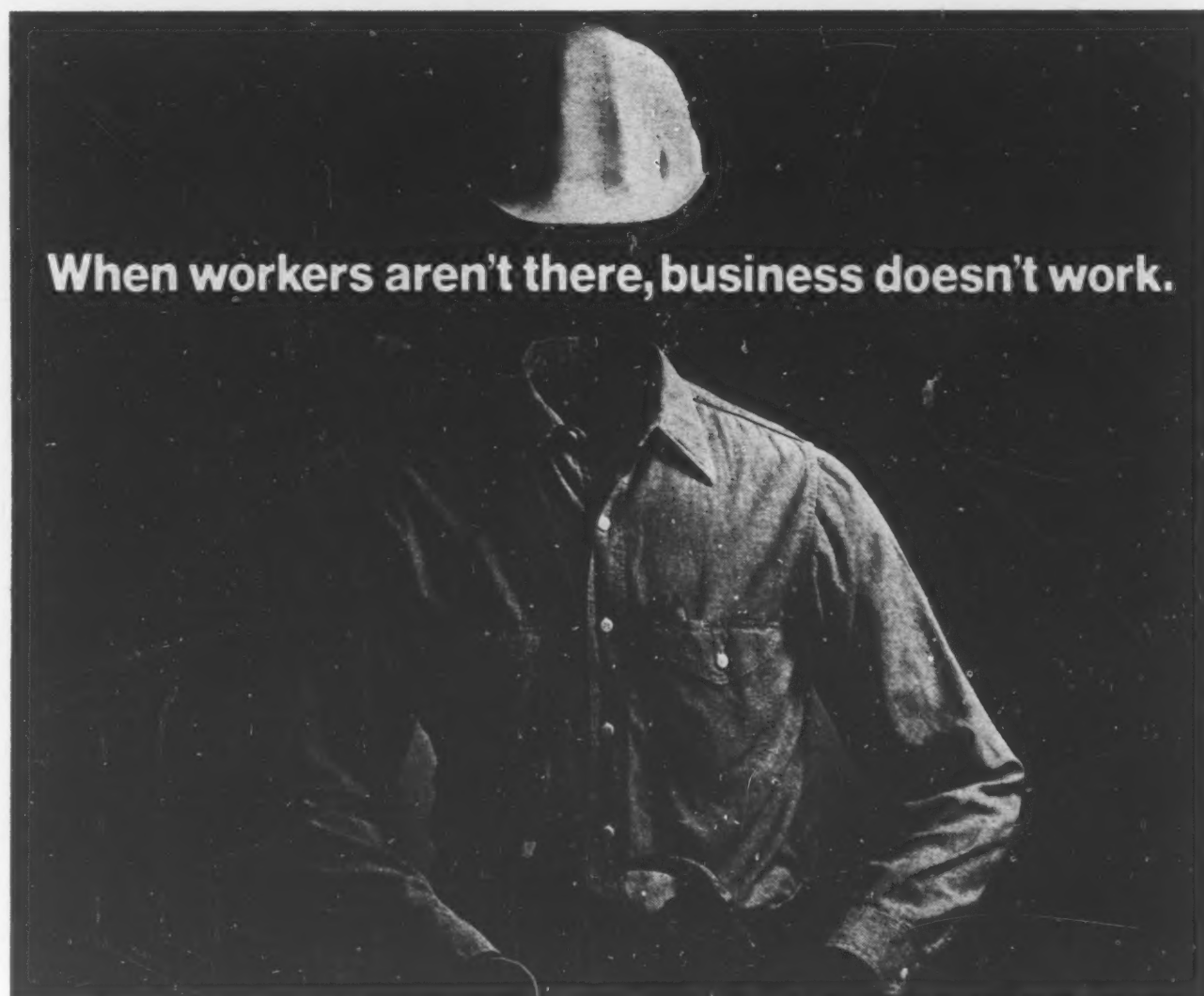
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CHILDREN'S APPAREL/TOP BRANDS

Children's Apparel

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Garanimals	24%	17%	21%	21%
Garan	10	15	9	14
Lee	10	14	18	—
Curity	6	3	14	28
Wrangler	10	14	12	6
Pampers	1	6	20	6
Health-Tex	5	2	15	15
Spencer	4	8	11	1
Levi's	—	5	7	6
Gerber	—	3	1	15

Source: DSN/Leo J. Shapiro & Associates



Murphy's Mart highlighted two of the top five children's wear brands, Lee and Garan, in its prototype store outside Pittsburgh. Only 5% of those polled saw a rise in kid's wear brands this year. (DSN photo)

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Children's

(Continued from page 59)

named by 8%.

In the regional breakout, Garanimals held its top position in 3 out of the 4 areas. In the West, Curity was mentioned most often—by 28% of the managers. Garanimals was named by 21% and both Gerber and Health-Tex were named by 15%. Garan was not far behind with mentions by 14%.

Surprisingly, No. 3, Lee, which got double digit mentions in every other region, was named by less than 1% of the managers in the West. The most frequent naming of Lee came in the North Central region, where 18% of the managers listed it as a top seller.

Different Emphasis

Wrangler was strongest in the South, where 14% called it a top seller in children's wear. Health-Tex got its best scores in the North Central states and in the West, with 15% of the managers in each area citing the brand. In the South, however, only 2% named Health-Tex.

Gerber was extremely strong in the West with 15% of the responses compared to less than 1% in the Northeast, 1% in the North Central and 3% in the South.

The breakout of results from four major chains showed that each one has its own story in children's wear. At K mart, for example, no managers named the top three brands. The top sellers at that chain included Pampers with 16%, Curity with 11% and Spencer with 8%.

At Wal-Mart, Garanimals is the top mover named by close to half—46%—of the managers polled. Garan, listed by 29% at the chain, was also impressive, according to the survey.

FOOD, CANDY, SNACKS/TOP BRANDS

High-Turning Candies, Snacks Take Lead

High-turning candies and snacks brands hold a firm lead as the nation's discounters' best-selling food brands.

Candies and snacks were named best sellers in 9 out of 10 instances by the store managers surveyed. The other leading food brand, Nabisco, was cited seventh most frequently.

The popularity of candies and snacks among store managers is evident by double digit tallies registered by 9 of the 10 named food brands. The food category at discounters is dominated by candies, chips, nuts, soft drinks and cookies and cracker brands, store managers said.

M&M, the No. 1 brand mentioned by 41% of store managers polled, received considerably higher top brand citations by upscalers, 50%, than by conventional chain managers, 39%. Another M&M brand, Mars, was mentioned third most often as a leading seller.

Hershey is the No. 2 brand in the survey, named by 35% of store managers polled. It achieved the second spot on the strength of conventional store manager mentions, 37%, compared with upscalers' 26% frequency of mention.

The popularity of Mars among upscale store managers, who cited the brand as a best seller 45% of the time, compared with 32% at conventional stores, earned it the third highest level of brand citations.

Planters, discounters' No. 4 brand at 29%, was the only brand among the top five to receive consistent mentions from both upscale and conventional full-liners.

Brach's, also at 29% among all full-line discounters, achieved its standing because of its much sharper popularity among conventional store managers, 34%, compared with an 8% level of mentions among upscalers.

Notably, upscalers provided the impetus for brands No. 6 through No. 9 of Frito-Lay, Nabisco, Pepsi and Coke, respectively. Frito-Lay, for instance, was cited by 40% of managers at upscale chains such as Target, while being named just 25% of the time by conventional discounters such as K mart,

(Continued on page 64)

Food, Candy, Snacks

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
M&M	41%	39%	50%
Hershey's	35	37	26
Mars	34	32	45
Planters	29	29	28
Brach's	29	34	8
Frito Lay	27	25	40
Nabisco	17	13	32
Pepsi	12	8	33
Coke	10	8	21
Whitman	9	12	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
M&M	45%	38%	50%	50%
Hershey's	28	28	29	19
Mars	32	22	39	44
Planters	20	14	46	31
Brach's	28	68	5	—

Source: DSN/Leo J. Shapiro & Associates

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Growth Regions

South: 4%
North Central: 2%
West: 7%

In food, candy, snacks, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the West—7%.

Source: DSN/Leo J. Shapiro & Associates

FOOD, CANDY, SNACKS/TOP BRANDS

Food, Candy, Snacks

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
M&M	34%	44%	48%	34%
Hershey's	52	35	34	20
Mars	20	31	42	41
Planters	37	29	21	35
Brach's	22	43	28	12
Frito Lay	28	33	24	24
Nabisco	11	20	23	7
Pepsi	6	10	17	13
Coke	6	8	8	20
Whitman	5	8	15	8

Source: DSN/Leo J. Shapiro & Associates



Chocolate candy brands, as shown at Caldor, Medford, Mass., topped four of the top five popularity spots among store managers polled. (DSN photo)

Food

(Continued from page 63)

Wal-Mart and Zayre.

Percentage differences between mentions at upscale and conventional chains for other brands were even more striking: Nabisco, named by 32% at upscalers compared with 13% at conventional stores; Pepsi, 33% vs. 8%; Coke, 21% compared with 8%.

Store manager mentions of the five leading brands varied widely by chain. For instance, twice the percentage of Target store managers cited Mars as a prime performer than did Wal-Mart managers, 44% vs. 22%. Even starker, 68% of Wal-Mart managers named Brach's compared with 5% of the Zayre managers.

Planters' strongest chain showing, 46% at Zayre, outstripped its 14% level of mentions at Wal-Mart.

The top two brands, M&M and Hershey, displayed the most consistency at leading full-liners, whose responses were broken out. M&M's level of mentions ranged from 38% at Wal-Mart to 50% at both Zayre and Target. Hershey's citations ranged from 19% at Target to 29% at Zayre.

The Other View

K mart store managers' responses were in the mid-ranges compared to other chains for each of the five leading brands.

Discount store managers in all parts of the country except the Northeast cited an increase in the number of food brands sold during 1984. The greatest brand growth apparently took place in the West, where 7% of the store managers reported broadened brand assortments; 4% of managers in the South said the same, as did 2% in the North Central states.

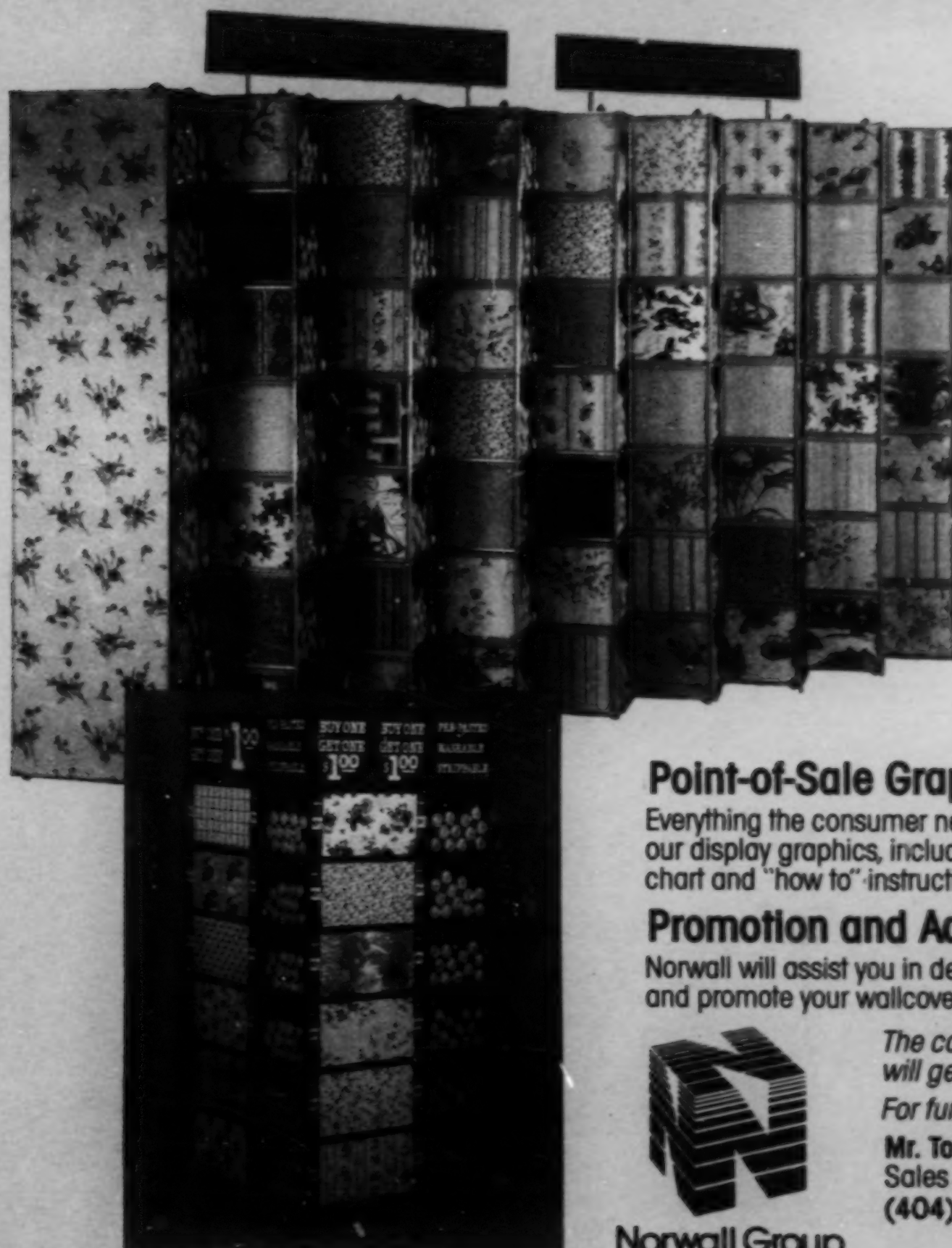
Notably, the Northeast provided the highest regional levels of mention for Hershey and Planters. Hershey was identified by 52% of Northeastern store managers as a best seller, compared with just 20% in the West, 34% in the North Central region and 35% in the South.

Planters fared better in the Northeast, at 37%, than in the South.

Compared to its mentions by 41% of all full-line store managers, M&M was weak in the Northeast, where it was named a top brand by 34% of store managers. The top brands' highest level of mentions was in the North Central region, 48%.

The Mars brand also achieved its highest number of citations in the North Central states, 42%. That's more than double its level of mentions in the Northeast, 20%, and is slightly higher than its 31% level in the South and 41% in the West.

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Stanley, Black & Decker Clearly Dominant

Hardware is clearly dominated by two brands, Stanley and Black & Decker, which were cited as leading sellers by nearly 2 out of 3 store managers nationwide.

General Electric ranked third and was mentioned as a top department performer by just 8% at full-line chains.

Glidden and Hirsh, in fourth- and fifth-place spots, were named as leading hardware brands by 6% of discount store managers polled.

Significantly, each of the top five brands represents a different hardware category—hand tools, power tools and work tables, electrical, paint and shelving.

Popularity of the top two brands far exceeds others in the department, but Black & Decker appears to have more consistent support among managers at all full-liners. Black & Decker was named as a best-seller by 64% of conventional discount store managers and 62% of upscale stores. Stanley, on the other hand, was considered a top brand by 71% of managers at conventional discount stores and just 41% of upscale managers.

General Electric fared almost twice as well among managers at upscale chains, who listed it as a top brand 12% of the time compared with conventional store managers' 7% frequency of mention.

Even the top brand standings of Glidden and Hirsh, the next leading sellers, according to store managers polled, emanated largely from their strength at up-scalers. Both were cited by 24% of upscale store managers, compared with respective 2% and 1% levels of mention among conventional discounters, the survey revealed.

That trend reversed for Skil and Lucite, brands No. 6 and No. 7, which were cited as leading sellers by considerably more conventional store managers than up-scalers. Skil was named by 7% at conventional discounters and not at all at upscale chains. Lucite was cited as a top brand by 6% of managers at conventional full-liners, doubling its number of mentions from those at up-scalers.

Great Neck, cited eighth
(Continued on page 68)

Hardware				
Top Brands Vary by Type of Outlet				
Brands	All Discounters	Conventional Discounters	Upscale Discounters	
Stanley	65%	71%	41%	
Black & Decker	64	64	62	
General Electric	8	7	12	
Glidden	6	2	24	
Hirsh	6	1	24	
Skil	5	7	—	
Lucite	5	6	3	
Great Neck	3	2	9	
Genie	3	1	8	
Red Devil	2	1	8	

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains				
Brands	K mart	Wal-Mart	Zayre	Target
Stanley	78%	62%	90%	32%
Black & Decker	77	73	63	58
General Electric	1	25	13	13
Glidden	2	—	—	28
Hirsh	1	—	2	28

Source: DSN/Leo J. Shapiro & Associates

GET READY FOR GROWING READY-TO-USE SALES.

The ever-expanding line of ORTHO ready-to-use weed and insect sprays is sure to be a big hit with your customers in '85. We have products and new sizes...24-ounce, half-gallon and gallon...targeted to the growing market of gardeners who want proven results quickly and conveniently. How can they miss? Especially with the advertising and promotion support planned for 1985.

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Growth Regions

Northeast: 24%

South: 14%

North Central: 5%

In hardware, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the Northeast States—24%.

Source: DSN/Leo J. Shapiro & Associates

HARDWARE/TOP BRANDS

Hardware

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Stanley	77%	63%	65%	57%
Black & Decker	54	60	67	73
General Electric	4	12	8	7
Glidden	1	6	14	—
Hirsh	1	4	8	8
Skil	—	4	—	21
Lucite	6	9	4	—
Great Neck	—	5	6	—
Genie	4	1	1	6
Red Devil	—	2	5	—

Source: DSN/Leo J. Shapiro & Associates



Hardware's brand influx was three times as great this year at conventional discounters than upscalers, despite dominance of a few popular brands, said store managers polled. Shown is Caldor, Medford, Mass. (DSN photo)

Hardware

(Continued from page 67)

most often as a best seller by discount store managers, was more than four times stronger at upscale than conventional discounters, the survey revealed. Genie and Red Devil, brands No. 9 and No. 10, were named top brands eight times more often at upscalers.

When store managers at four leading chains were asked to name their best-selling brands, Stanley and Black & Decker split the vote for the top. Stanley edged Black & Decker by one percentage point, 78% to 77%, at K mart. Stanley was cited as a top brand by 90% of Zayre store managers, who named Black & Decker just 63% of the time.

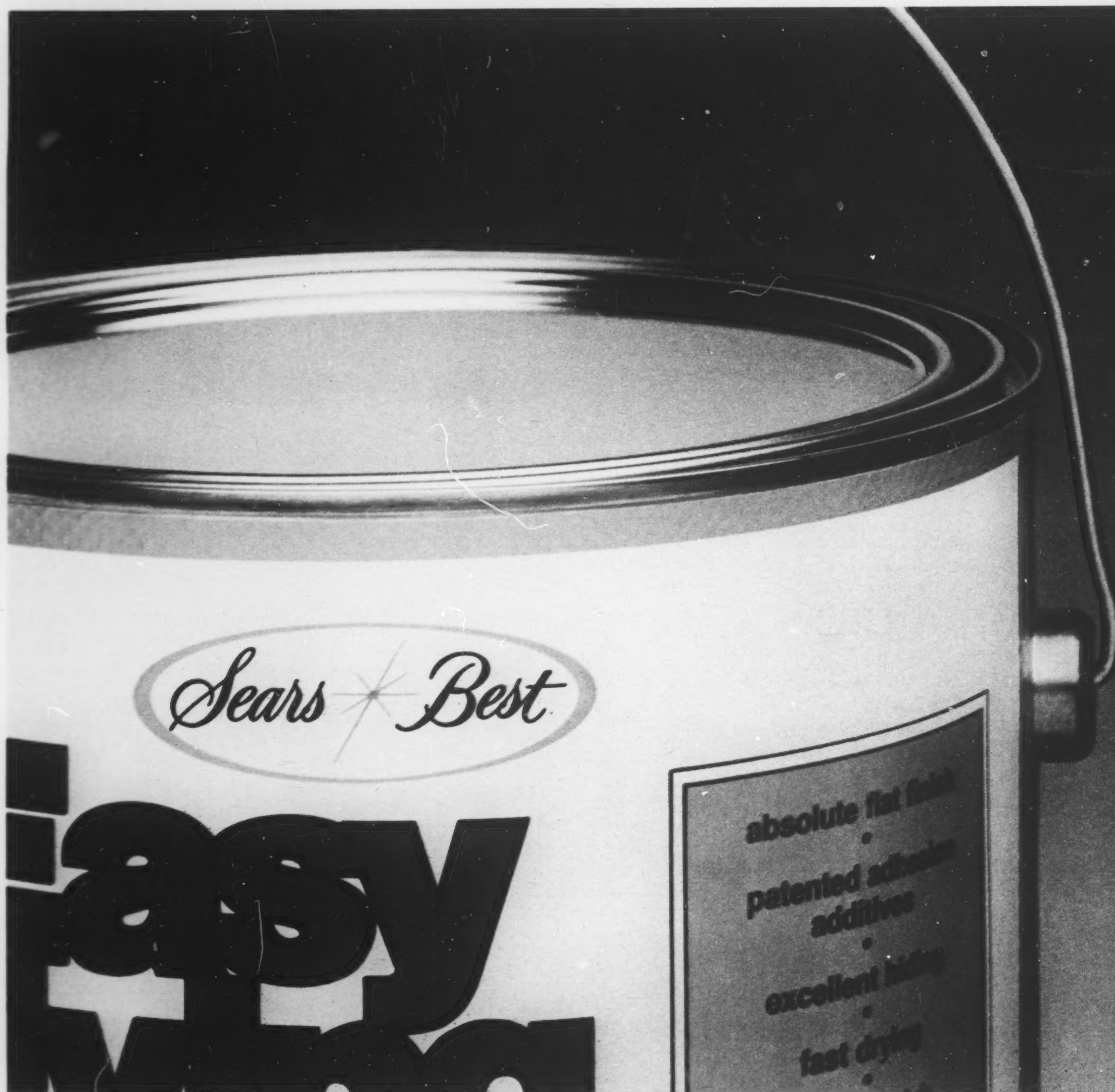
Figures Analyzed

Black & Decker fared better than Stanley among Wal-Mart managers, however, who cited Black & Decker 73% of the time compared with Stanley's 62% level of mention. Similarly, 58% of Target managers polled said Black & Decker was a leading brand, compared with 32% who named Stanley.

General Electric was the only other top brand in hardware to receive mentions at all four leading chains broken out in the survey. Its popularity swung widely, however, from 1% of K mart managers naming it as a leading brand up to 25% at Wal-Mart.

Glidden, cited as a best seller by 28% of Target store managers, was named by neither Wal-Mart nor Zayre. Hirsh similarly received no mentions at Wal-Mart.

Despite the apparent dominance of a handful of brands in hardware, discounters in most parts of the country appeared more willing to add more hardware brands in 1984 than in many other categories. Nearly one manager in four in the Northeast reported wider hardware brand assortments this year.



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Outdoor Equipment Grabs the Spotlight

Sporting Goods

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Coleman	47%	42%	65%
Wilson	39	37	46
Spalding	30	29	38
Zebco	20	20	20
Remington	14	15	10
Igloo	13	13	12
Daiwa	11	12	6
Diversified	10	6	27
Garcia	10	8	20
MacGregor	9	12	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Coleman	23%	48%	46%	60%
Wilson	32	31	72	46
Spalding	22	25	24	39
Zebco	8	24	7	15
Remington	9	19	—	11

Source: DSN/Leo J. Shapiro & Associates

Discounters are basking in the great outdoors.

Six of the top 10 sporting goods brands are outdoor, recreational equipment for camping, fishing and hunting, and their popularity is most evident in the milder climate of the West.

No. 1 Coleman was named 47% of the time as a top brand, leading the outdoor segment, far and away. Although more frequently named by upscale discount store managers than those at conventional chains, 65% to 42%, the brand was clearly the leader out West.

Some 74% of Western store managers polled named Coleman as a top brand. Managers in the Northeast named the brand 50% of the time and its popularity waned to 37% in both the South and North Central regions.

Overall, 12% of store managers polled in the South, 11% of those in the North Central region and 4% of those in the Northeast reported brands were on the rise in their departments. No growth was seen by Western store managers, where most brands were strongest.

Location of Support

Six of the top seven sporting goods brands saw their greatest popularity in the Western region. Only No. 2, Wilson, had higher responses in the other three regions.

Wilson and No. 3, Spalding, both leaders in competitive sporting goods equipment, were named more often by upscale discounters than by conventional chains. Interestingly, 4 out of the top 5 brands were named more frequently by the upscale segment. The exception is Remington, which was named by 15% of conventional store managers compared to only 10% of the upscale.

On a chain-by-chain basis, however, these were some wide swings. Wilson, for example, although named by 46% of upscale store managers polled, saw a 72% response rate from Zayre store managers, compared to a 46% mention at upscale Target. The brand was also named by 32% of K mart managers and 31% of Wal-Mart managers, which con-

(Continued on page 71)

Growth Regions

Northeast: 4%
South: 12%
North Central: 11%

In sporting goods, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the South—12%.

Source: DSN/Leo J. Shapiro & Associates

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SPORTING GOODS/TOP BRANDS



Diversified Products, its Gympac 1000 seen here in Fred Meyer, Portland, was the only exercise equipment brand to crack the top 10 sporting goods list. (DSN photo)

Sporting Goods

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Coleman	50%	37%	37%	74%
Wilson	44	42	40	27
Spalding	36	19	32	41
Zebco	—	24	21	30
Remington	1	18	13	21
Igloo	4	8	9	34
Daiwa	4	11	7	21
Diversified	11	12	15	1
Garcia	7	12	8	14
McGregor	8	6	16	6

Source: DSN/Leo J. Shapiro & Associates

Sporting Goods

(Continued from page 69)

forms more closely to its 39% overall response.

Zebco, the leading fishing brand, and No. 4 overall, scored a consistent 20% mention across the board but saw vast regional differences.

Again, most frequently named by West region managers, 30%, its popularity declined to a 24% share in the South and a 21% mention in the North Central states to less than 1% recognition in the Northeast.

A similar regional performance held true for the No. 5 brand, Remington. West Coast store managers named the brand 21% of the time but its popularity diminished to just a 1% mention in the Northeast.

The Other View

The opposite phenomenon occurred in the case of Diversified Products (DP)—No. 8 overall, and the only exercise equipment brand making the top 10 listing.

Its strongest response was in the North Central area, where store managers named the brand 15% of the time. In the Northeast and South regions, it received an 11% and 12% response, but it totally dropped off in the West, where managers only named DP 1% of the time.

DP was also named by 27% of upscale discounters compared with only a 6% response at conventional chains.

Rounding out the bottom tier, Igloo, No. 6; Daiwa, No. 7 and MacGregor, No. 10 were all named more often by conventional discounters. Only Garcia, No. 9, was stronger at the upscale level, named 20% of the time, compared to an 8% share at conventional chains.



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3 Subcategories Score on Leaders' List

Stationery

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Mead	52%	43%	90%
Bic	29	31	23
Papermate	21	23	13
American Greetings	12	13	6
Parker	11	10	18
Scripto	7	7	4
Gibson Buzza	6	6	8
Pentel	6	5	8
Sheaffer	5	6	—
Ambassador	5	3	11

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Mead	15%	70%	22%	93%
Bic	15	59	34	24
Papermate	33	11	21	7
American Greetings	12	16	3	7
Parker	19	2	21	21

Source: DSN/Leo J. Shapiro & Associates

Three product categories are represented on the list of stationery brands tagged top sellers by discount store managers—filler paper, writing instruments and greeting cards.

Mead, a filler paper/notebook supplier, is clearly the stationery brand that was cited most often as a top seller by those polled. It is the only brand named by over half of all the store managers polled.

Among upscale chains only Mead was mentioned by an overwhelming majority (90%) of the store managers. At conventional chains, 43% of the managers named Mead a top seller.

The next three brands listed were named more often by managers at conventional discount stores than upscale chains. Bic, the writing instrument brand named most often, was cited by 29% of all managers polled, with 31% at conventional chains naming Bic, while at the upscale chains 23% of the managers mentioned the brand.

Figures Analyzed

No. 3, Papermate, another writing instrument brand, had similar results when managers' responses were broken out, with 21% of the entire group naming the brand. However, it was stronger in conventional chains, where 23% named Papermate compared with 13% at upscale chains.

American Greetings, the greeting card brand that came up most, was also most popular among managers at conventional chains. Double the percentage—13% vs. 6%—of the managers at conventional chains cited American Greetings compared with those at upscale chains.

In contrast, the other two greeting card brands listed on the top brands list were more popular among managers at upscale chains. In the case of Gibson Buzza the difference was only 2 percentage points—6% at conventional chains and 8% at upscale chains. But in the case of Ambassador, a division of Hallmark, the difference was much wider. Only 3% of managers polled at conventional chains named it a best seller, while 11% of those at upscale chains said Ambassador.

The fifth most often cited brand, Parker, was more highly recognized by managers at upscale discount chains; 18% of those polled at upscale chains tagged it a best seller compared with 10% at conventional chains.

For the remaining pen brands on the list, Scripto and Sheaffer both had more

(Continued on page 74)

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STATIONERY/TOP BRANDS

Stationery

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Mead	37%	46%	59%	64%
Bic	33	29	18	42
Papermate	19	15	20	34
American Greetings	8	13	10	15
Parker	13	7	21	1
Scripto	8	8	3	8
Gibson Buzza	3	3	6	15
Pentel	—	2	5	18
Shoaffer	10	3	7	1
Ambassador	3	6	7	—

Source: DSN/Leo J. Shapiro & Associates



In stationery, Mead was the brand cited most often. Although the name is associated with filler paper and notebooks, the brand is also seen in the Richway, Snellville, Ga., assortment of file folders.

Stationery

(Continued from page 72)

mentions from managers in the conventional chain sector. Pentel was named more often by those at upscale stores.

In the regional breakout, Mead remained the most often cited brand in all four areas of the nation. Bic was named more than the other pen brands in all except the North Central region where 18% of the managers named Bic and 20% named Papermate.

Among greeting card brands, American Greetings held its top position except in the West, where Gibson Buzza matched its citations from 15% of the store managers in the area.

Interest Differs

Notable discrepancies in stationery brands' popularity by regions show up in the remaining names on the list. Parker, for example, was most often named in the North Central with mentions from 21% of the managers. But, in the West the brand was cited by just 1% and in the South by 7%.

Scripto, which was named by 8% of the managers in three regions, won mentions by only 3% of those polled in the North Central part of the country.

The breakout of responses from managers at four major chains shows some differences from the overall results. At K mart, for example, Papermate was the stationery brand managers mentioned most often, followed by Parker and then Mead and Bic.

At Zayre, store managers named Bic most often and Mead second most often.

At Wal-Mart responses were more in line with the overall results except that American Greetings was named more often than Papermate.

Parker was named third most often at Target, beating out the Papermate brand.

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Handful of Brands Called Dominant

The domestics category is dominated by a handful of brands, according to store managers polled.

Only four brands in the category—Cannon, St. Mary's, J. P. Stevens and Pepperell/West Point—managed to win double digit percentages of managers' responses.

Overall, Cannon is most often mentioned as a top-selling domestics brand. In both segments of full-line discounting the brand was named as a top seller by more than half of those polled.

The No. 2 domestics brand, St. Mary's, is well entrenched in the conventional stores with mentions by 39% of the managers. Among those at upscale chains, however, the brand was named only 4% of the time.

The reverse was true for the No. 3 brand, J. P. Stevens. That label was strongest among upscale chains, the survey reveals. Mentions by 23% of the managers overall resulted from recognition by a whopping 62% of managers at upscale chains and by a much smaller 13% of the conventional chain managers.

More Winners

Fieldcrest came in as No. 5 by being named consistently—by 7% of managers at conventional chains and by 8% of those at upscale stores.

No. 6, Burlington, was also named by 7% of the managers in conventional chains. At upscale chains, however, the label's popularity dropped off—only 3% of managers at those stores listed the brand as a top seller.

Interestingly, the newest name in discounters' domestics assortments, Gloria Vanderbilt, made the list as No. 7, thanks to mentions by 5% of the managers polled.

Not only is that brand less than a year old within the category, it is also carried at relatively few chains. K mart, Venture, Clover, Hills, Bradlees and Caldor are involved to some extent with the Vanderbilt program. What's more, none of those chains have reportedly sold high volumes of the pricey line. However, Stevens did recently announce price

(Continued on page 77)

Domestics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Cannon	56%	57%	54%
St. Mary's	24	29	4
J. P. Stevens	23	13	62
Pepperell/Lady Pepperell/West Point	12	12	11
Fieldcrest	7	7	8
Burlington	6	7	3
Gloria Vanderbilt	5	3	13
Santa Cruz	5	4	8
Kenney's	4	5	—
Springs	3	4	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Cannon	76%	87%	32%	50%
St. Marys	19	25	32	3
J.P. Stevens	27	21	6	73
Pepperell/Lady Pepperell/West Point	19	25	3	13
Fieldcrest	14	—	7	1

Source: DSN/Leo J. Shapiro & Associates



Growth Regions

Northeast: 13%
South: 6%
North Central: 16%
West: 7%

In domestics, the most discount store managers citing an increase in the number of brands carried (1984 vs. 1983) were in the North Central States—16%.

Source: DSN/Leo J. Shapiro & Associates

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DOMESTICS/TOP BRANDS



Store managers indicate only a handful of brands dominates in domestics. But, 11% of those polled see the amount of brands rising, as chains like Murphy's Mart, Robinson Township, Pa., focus more on fashion. (DSN photo)

Domestics

(Continued from page 77)

tics; at Target 9% did, and at Wal-Mart 5% did.

Responses from managers at those chains also showed that Cannon has less dominance at Zayre and Target than it has at K mart and Wal-Mart. At Zayre, for instance, just as many managers—32%—named St. Mary's as named Cannon. The brand that got the third highest number of mentions at Zayre, Kenny, is not one of the top five at all. However, that No. 9 brand was named by 20% of the managers at Zayre as a top-selling brand.

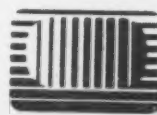
At Target, more managers named No. 3 Stevens (73%) than named No. 1 Cannon (50%). The overall No. 4 brand, Pepperell/West Point, beat No. 2 St. Mary's at Target as well. Only 3% of the Target managers listed St. Mary's, while 13% named Pepperell/West Point.

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Personal Care

(Continued from page 29)

well. For example, G.E. received its highest levels of mention at Wal-Mart, 65%, compared to its lowest, 21%, at Zayre. Conair scored 87% at K mart compared with 18% at Target; Clairol, 37% at Target and 16% at Zayre; Norelco, 55% at Target and 1% at K mart; Vidal Sassoon, 31% at Target and 1% at K mart.

Regional strengths in the top five brands were also revealed by the survey. For example, G.E. displayed more than twice the strength in the West as in the North Central States. Discount store managers in the West cited G.E. 65% of the time, compared with 30% of North Central managers. In the Northeast, 53% of managers polled identified G.E., as did 52% in the South.

Locations A Consideration

Conair registered its strongest following among North Central store managers, who cited the brand 50% of the time as a best seller. Norelco and Vidal Sassoon also received their heaviest citations in the North Central region, where Clairol, like G.E., was weakest.

In the other three regions of the country, Conair received consistent levels of mention: 41% in the Northeast; 43% each in the South and West.

The next brand, Clairol, swung more widely than that. Its level of citations in the West, 42%, nearly doubled its identifications in the North Central part of the country, 22%.

Norelco, on the other hand, was the second-leading brand behind Conair among North Central store managers, at 31%.